Automated User Account Setup

Electronic Records Express Website

Regional Administrator Instruction Guide

Office of Disability Systems
Division of Implementation and Health Information Technology
Electronic Medical Evidence and Health Information Branch

February 2006

Table of Contents

**** Note: All subjects and page numbers are hyperlinked. By holding the CTRL key and clicking the desired subject or page number you will be taken directly to the page within the document that contains the desired set of instructions.**

Table of Figures

Regional Administrator Instruction Guide

AUAS Roles

Automated User Account System (AUAS) privileges and rights are based on the assigned role: Administrator, Regional Administrator, Sponsor, or End-User. Each account has one assigned role. The assigned role cannot be modified.

The Administrator role is comprised of members from the Electronic Medical Evidence and Health Information Branch. The Regional Administrator role is comprised of Regional Office, OHA and ODISP staff designated to maintain Sponsor accounts. The Sponsor role is comprised of Professional Relation Officers (PRO), Medical Relation Officers (MRO) and OHA staff designated to maintain End-User accounts. The End-User role is assigned to accounts that can send or receive documents via the Electronic Records Express Website.

Only an Administrator can create/modify Administrator and Regional Administrator accounts. Administrators and Regional Administrators can create/modify Sponsor Accounts. Administrators, Regional Administrators and Sponsors can create/modify End-User accounts. All users can modify select information within their own accounts. (See Figure 1)

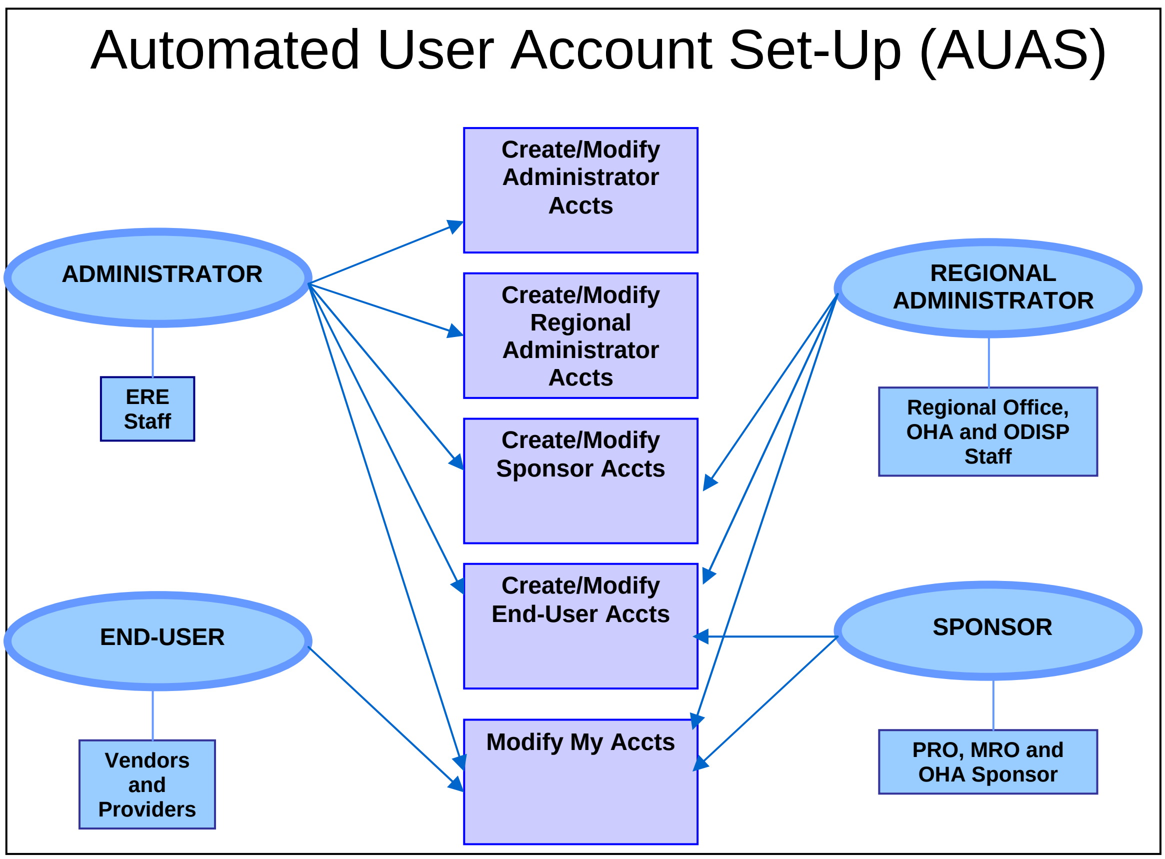


Figure 1: AUAS Roles

Administrator Privileges and Rights

The Regional Administrator has the authority to create and modify Sponsor and End User accounts. (See Figure 1)

Return to Table of Contents

Access the Account Maintenance Menu

Step 1: Login to the Electronic Records Express website using the personal User ID and password that has been assigned to you. The website address is: **http://eme.ssa.gov**. Upon successful login, you will see the Electronic Records Express homepage.

Step 2: Select the **Account Maintenance** hyperlink within the left navigation panel. This hyperlink is only displayed if the account role is Administrator, Regional Administrator or Sponsor. (See Figure 2)

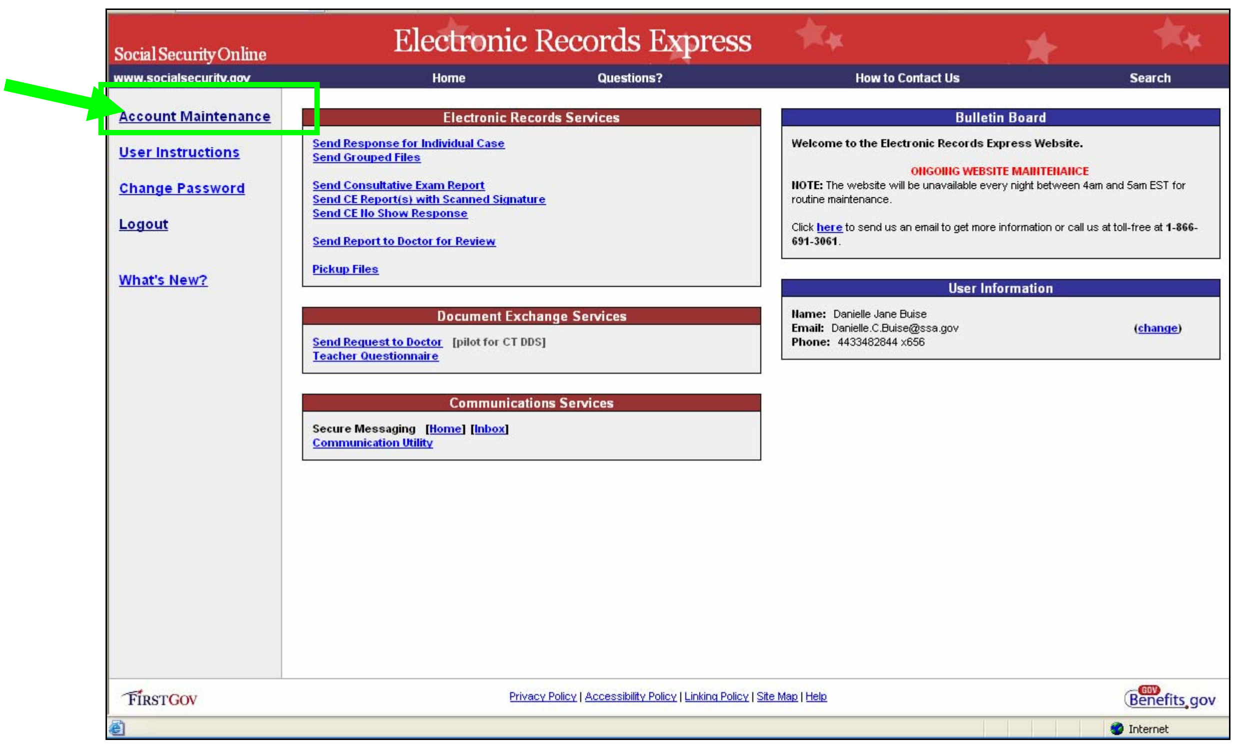


Figure 2: Account Maintenance Access

Step 3: The **Account Maintenance Menu** screen will be displayed (See Figure 3). The Account Maintenance Menu only displays the functions to which the account has privilege. The Administrator role has the highest level of authority; therefore, all functions are displayed.

Figure 3: Account Maintenance Menu

Return to Table of Contents

Create an Account

First, the type of account you wish to create must be determined based on whether there is a need to send or receive documents via the Electronic Records Express Website, or the role of the user. Only end-user accounts can send or receive documents via the Electronic Records Express Website. An end-user account is either shared among multiple personnel within an organization or set up for an individual's use. See the following instructions for the type of account you wish to create: Create an Individual End-User Account, Create an Organizational Shared End-User Account, Create a Sponsor Account

Create an Individual End-User Account

An individual end-user account is established when only one person will have access to the account. If an account needs to be shared among multiple personnel within an organization see Create an Organizational Shared End-User Account. See the following steps for the creation of an individual end-user account.

Step 1: Select the **Create an Individual End User Account** hyperlink from the Account Maintenance Menu.

**Note that mandatory fields on this webpage are marked with a red asterisk (*).

Step 2: Select the **Demo Account** checkbox at the top of the page to set up a demo account. **The Demo Account option should only be selected if documents will not be sent nor received via the Electronic Records Express Website.** Documents submitted via a demo account are not received by DMA and are not routed to the electronic folder. Therefore, please ascertain that this checkbox is **not** selected when setting up accounts for use of the Electronic Records Express website to upload or download files.

Step 3: Enter the desired **User ID** in the text box. SSA Policy requires that all User IDs be exactly **8** characters in length and they must contain at least 1 numeric and 1 alphabetic character. Special characters (e.g., &, %, #, @, etc.) are not permitted. (See Figure 4).

Figure 4: Create an Individual End-User – User ID

Step 4: Click the **Check User ID** button to verify if the User ID entered is unique.

Figure 5 below shows that the User ID entered does not exist. This User ID may be used for account setup. Continue to the next field.

If an alert is received stating that the User ID you entered is already in use, verify if the existing account is for the same user. You may need to update the existing account instead of creating a new account. If the existing account does not belong to the same user or if a new account is required for the same user, you must assign a different User ID to create the new account.

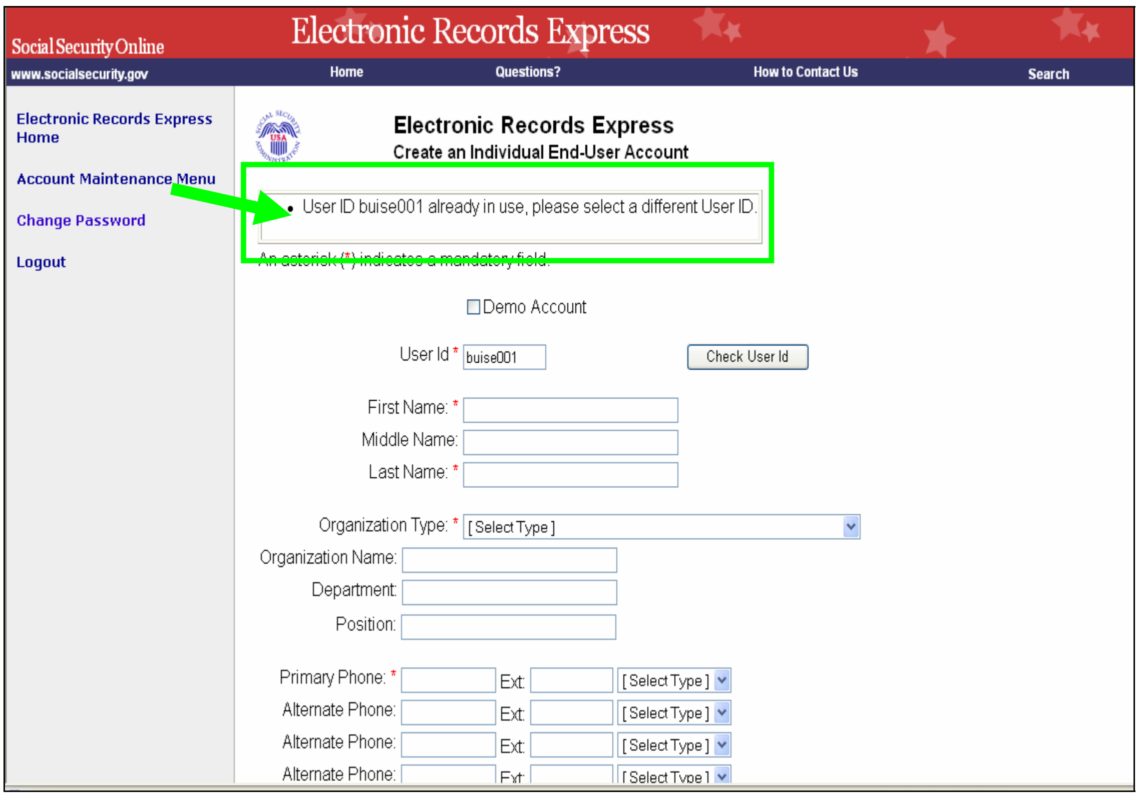


Figure 5: Create an Individual End-User – Check User ID alert

Step 5: Enter the requested **User** information:

- **First Name**
- **Middle Name**
- **Last Name**

Step 6: Enter the requested **Office** information:

- **Organization Type –** Select from the dropdown menu (See Figure 6)
- **Organization Name –** enter the name of the organization that the user represents
- **Department**
- **Position**
- **Telephone Number(s)**

- **Phone Type(s) –** Select the type from the dropdown menu (See Figure 7) for each phone number entered
- **Email Address(es)**
- **Address**

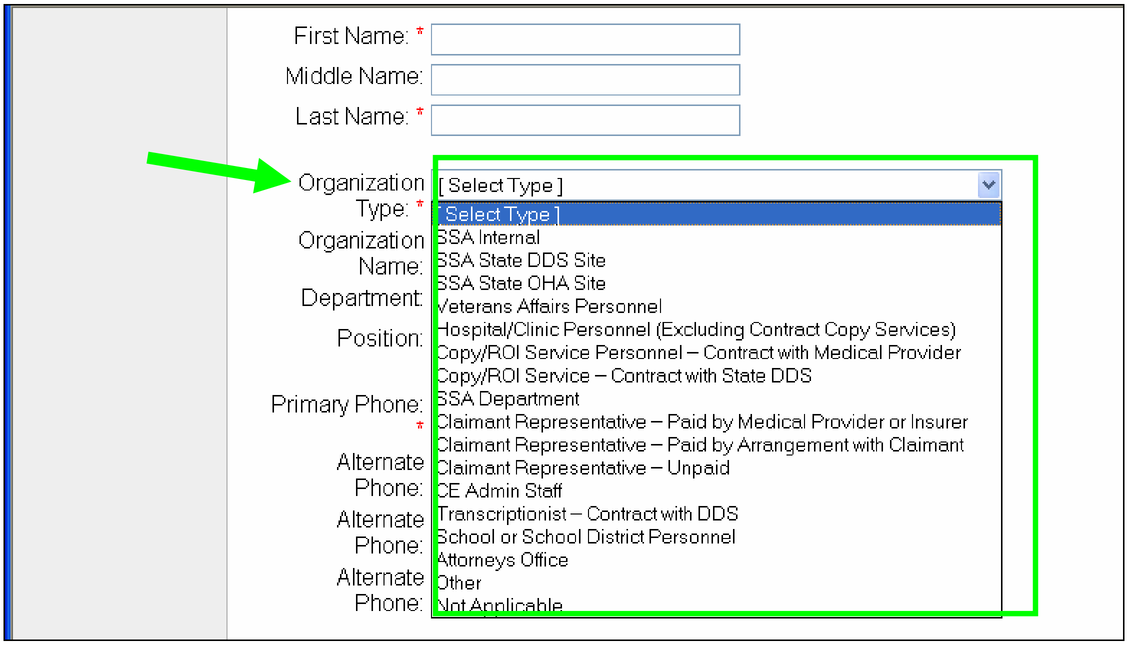


Figure 6: Create an Individual End-User – Organization Type

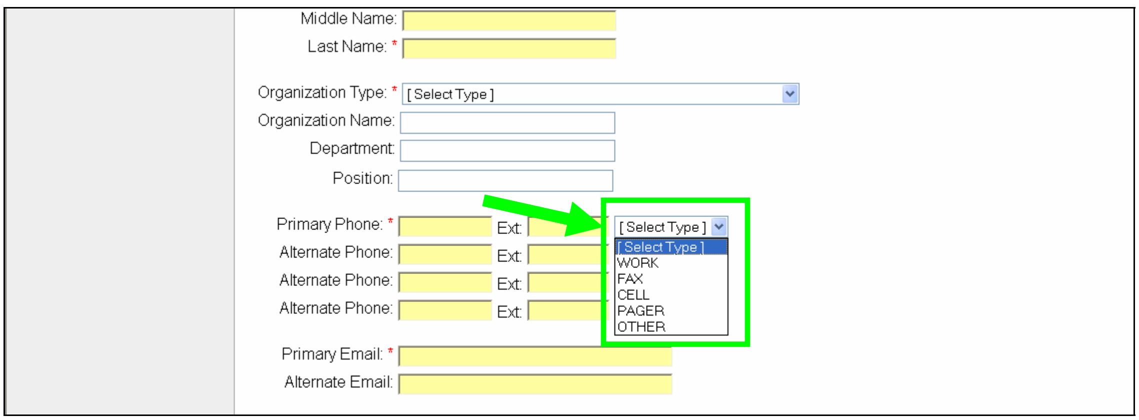


Figure 7: Create an Individual End-User – Phone Type

Step 7: Enter **Sponsor** information (See Figure 8):

- **Primary Site –** Select the sponsoring DDS/OHA site from the dropdown menu
- **Primary Site Contact –** Select the Sponsor from the dropdown list.

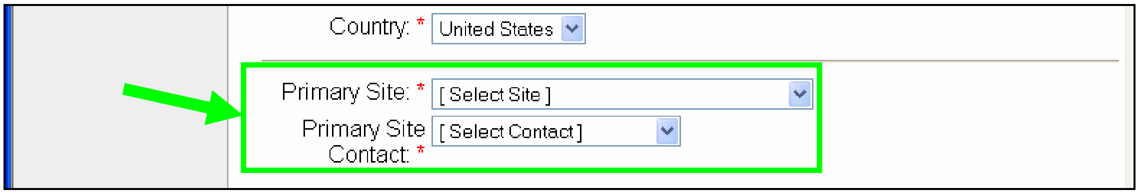


Figure 8: Create an Individual End-User – Sponsor Information

Step 8: Select the **Functions** (website utilities) to which the user will have access. Select all utilities the user needs. (See Figure 9)

****Note**: The Secure Messaging option needs prior approval from the Electronic Records Express Project Manager.

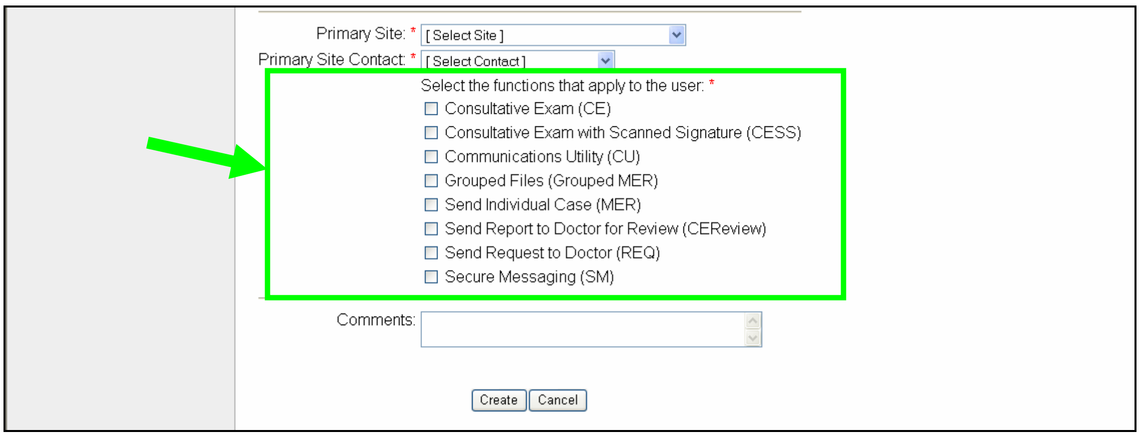


Figure 9: Create an Individual End-User – Functions

Step 9: Enter any **Comments** in the text box.

Step 10: Click the **Create** button to create the account ***OR*** click the **Cancel** button to cancel the account setup and return to the Account Maintenance Menu. The **Account Summary** page is generated when the **Create** button is selected. (See Figure 10)

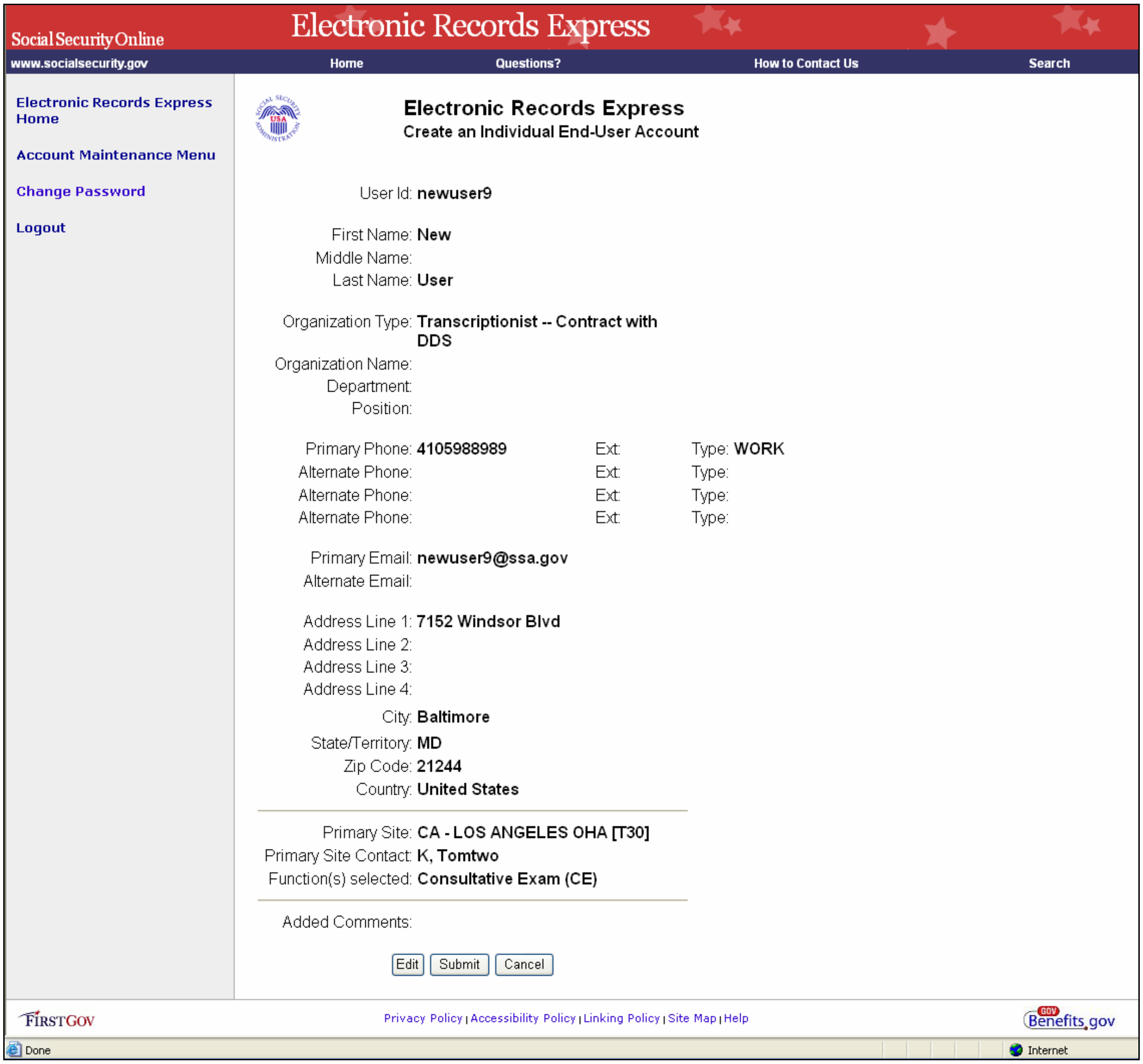


Figure 10: Create an Individual End-User – Account Summary Page

Step 11: From the **Account Summary** page, click the **Edit** button to return to the prior screen to change any information you have entered ***OR*** click the **Cancel** button to cancel the account setup ***OR*** click the **Submit** button to create the account.

Step 12: Clicking **Submit** button will activate the new account. You will receive a **Confirmation** screen that provides the **Temporary Password** for the new account. (See Figure 11)

Figure 11: Create an Individual End-User – Confirmation Screen

Step 13: The following **emails** are sent to provide notification of the new account (See Sample Email Notifications in the Appendix):

a. A confirmation email that includes the temporary password and identifying information for the new user will be sent to the creator of the account.

b. The Sponsor (Primary Site Contact) will receive a copy of the confirmation email that includes the temporary password and identifying information for the new user. The sponsor is advised in this email to contact the new user to provide the account password.

c. An email is sent to the new user to provide the User ID, instructions and Sponsor (Primary Site Contact) information.

Step 14: The **Sponsor** (Primary Site Contact) must contact the new user to provide the password. The temporary password which was automatically generated by the website is valid for one time use only. The first time the new user logs into the website, he/she must change the password.

Return to Table of Contents

Create an Organizational Shared End-User Account

An organizational shared end-user account is established when an account will be shared among multiple personnel within an organization. If an account needs to be set up where only one person will have access to the account see Create an Individual End-User Account. See the following steps for the creation of an organizational shared end-user account.

Step 1: Select the **Create an Organizational Shared End-User Account** hyperlink from the Account Maintenance Menu.

**Note that mandatory fields on this webpage are marked with a red asterisk (*).

Step 2: Select the **Demo Account** checkbox at the top of the page to set up a demo account. **The Demo Account option should only be selected if documents will not be sent nor received via the Electronic Records Express Website.** Documents submitted via a demo account are not received by DMA and are not routed to the electronic folder. Therefore, please ascertain that this checkbox is **not** selected when setting up accounts for use of the Electronic Records Express website to upload or download files.

Step 3: Enter the desired **User ID** in the text box. SSA Policy requires that all User IDs be exactly **8** characters in length and they must contain at least 1 numeric and 1 alphabetic character. Special characters (e.g., &, %, #, @, etc.) are not permitted. (See Figure 12).

Figure 12: Create an Organizational Shared End-User – User ID

Step 4: Click the **Check User ID** button to verify if the User ID entered is unique.

Figure 13 below shows that the User ID entered does not exist. This User ID may be used for account setup. Continue to the next field.

If an alert is received stating that the User ID you entered is already in use, verify if the existing account is for the same user. You may need to update the existing account instead of creating a new account. If the existing account does not belong to the same user or if a new account is required for the same user, you must assign a different User ID to create the new account.

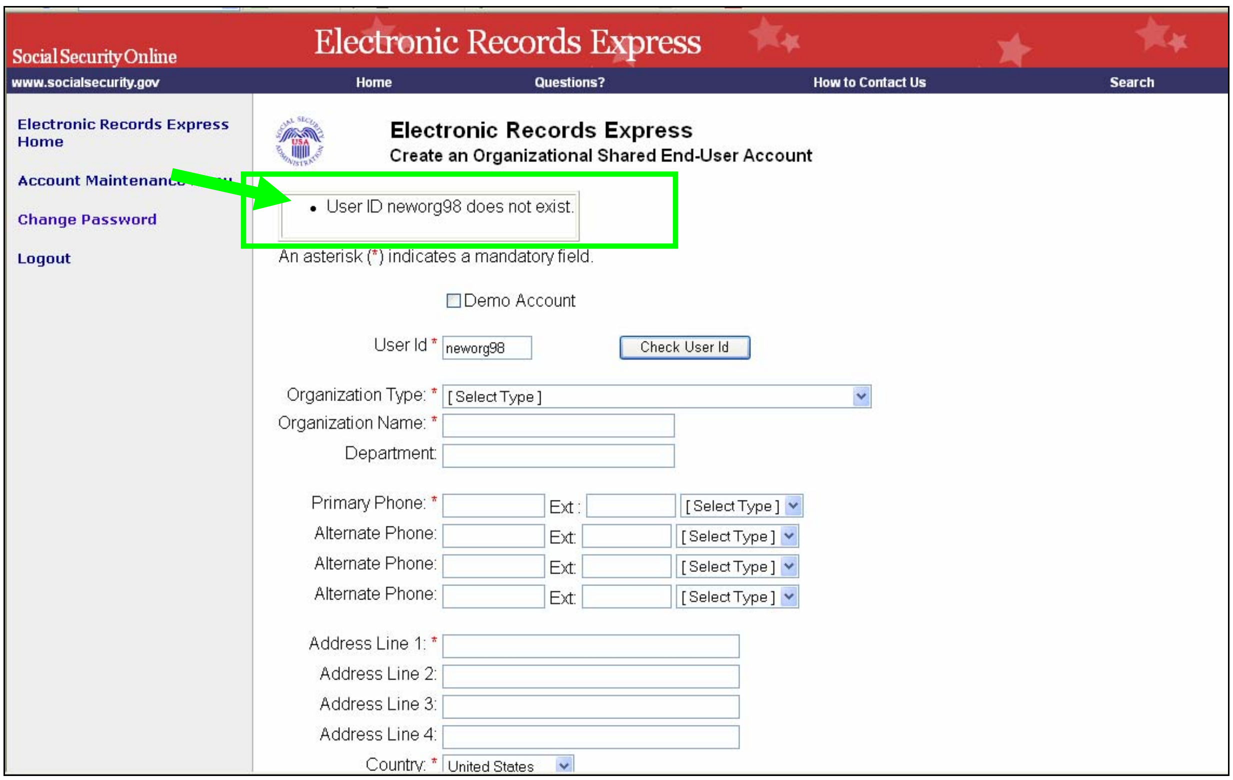


Figure 13: Create an Organizational Shared End-User – Check User ID alert

Step 5: Enter the requested **Organization** information into the webpage:

- **Organization Type –** Select from the dropdown menu (See Figure 14)
- **Organization Name –** enter the name of the organization that this account represents
- **Department**
- **Organization Telephone Number(s)**
- **Phone Type(s)** – Select the type from the dropdown menu (See Figure 15) for each phone number entered
- **Organization Address**

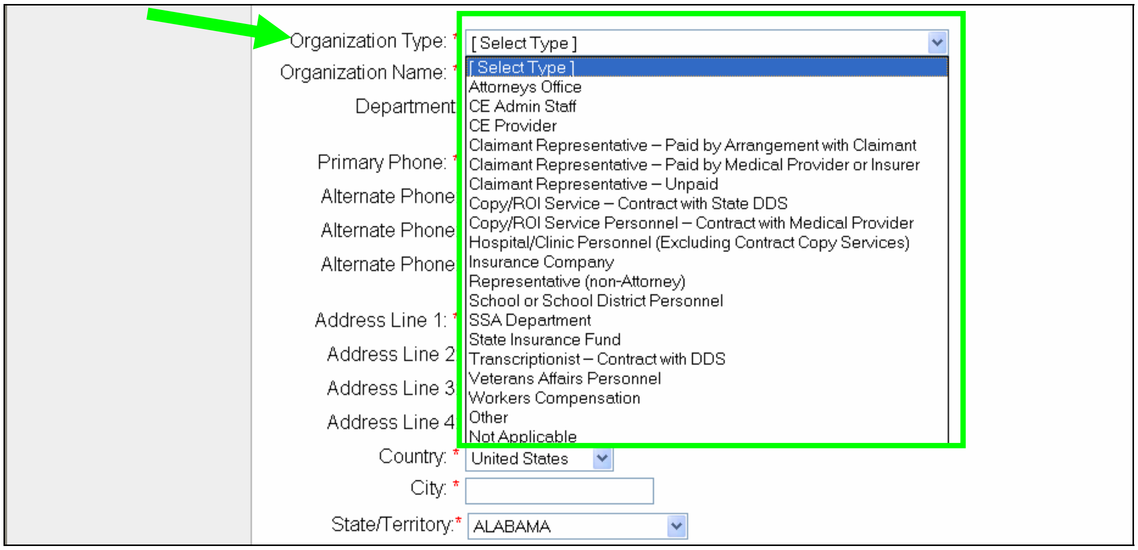


Figure 14: Create an Organizational Shared End-User – Organization Type

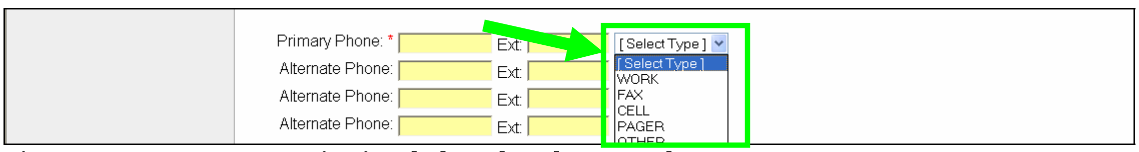


Figure 15: Create an Organizational Shared End-User – Phone Type

Step 6: Enter **Sponsor** information (See Figure 16):

- **Primary Site –** Select the sponsoring DDS/OHA site from the dropdown menu
- **Primary Site Contact –** Select the Sponsor from the dropdown list.

Figure 16: Create an Organizational Shared End-User – Sponsor Information

Step 7: Select the **Functions** (website utilities) to which the users will have access. Select all utilities the users need. (See Figure 17)

****Note**: The Secure Messaging option needs prior approval from the Electronic Records Express Project Manager.

****Note**: The Consultative Exam (CE) option cannot be selected for an Organizational Shared End-User account.

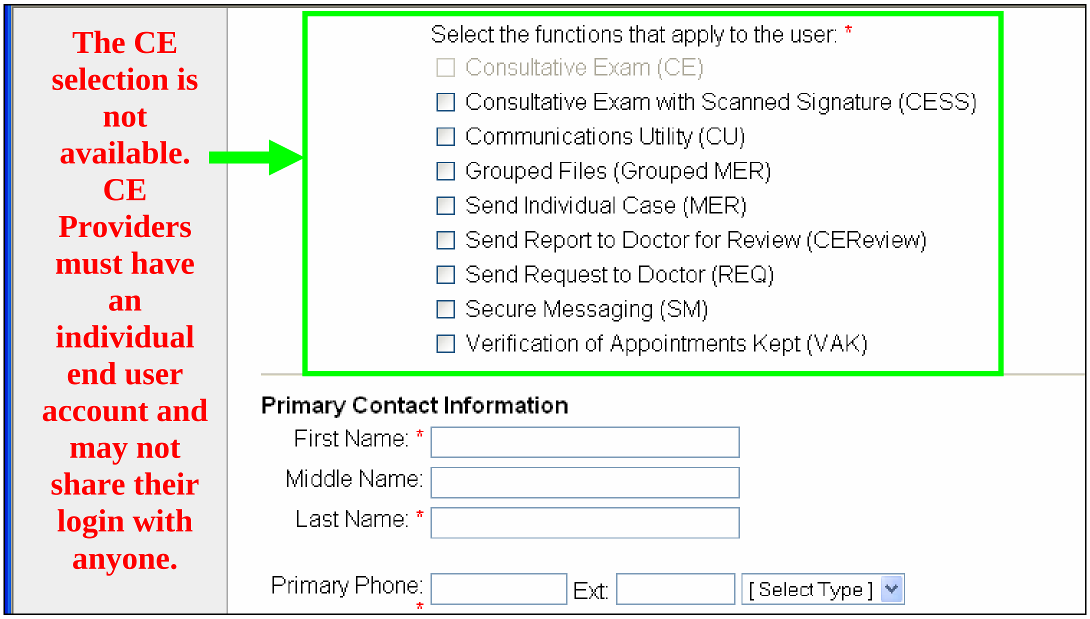


Figure 17: Create an Organizational Shared End-User – Functions

Step 8: Enter the requested **Primary Contact** and **Backup Contact** information (both Primary and Backup Contacts are required):

- **First Name**
- **Middle Name**
- **Last Name**
- **Telephone Number(s)**
- **Phone Type(s) –** Select the type from the dropdown menu (See Figure 15) for each phone number entered
- **Email Address(es)**

Step 9: Enter any **Comments** in the text box.

Step 10: Click the **Create** button to create the account ***OR*** click the **Cancel** button to cancel the account setup and return to the Account Maintenance Menu. The **Account Summary** page is generated when the **Create** button is selected. (See Figure 18)

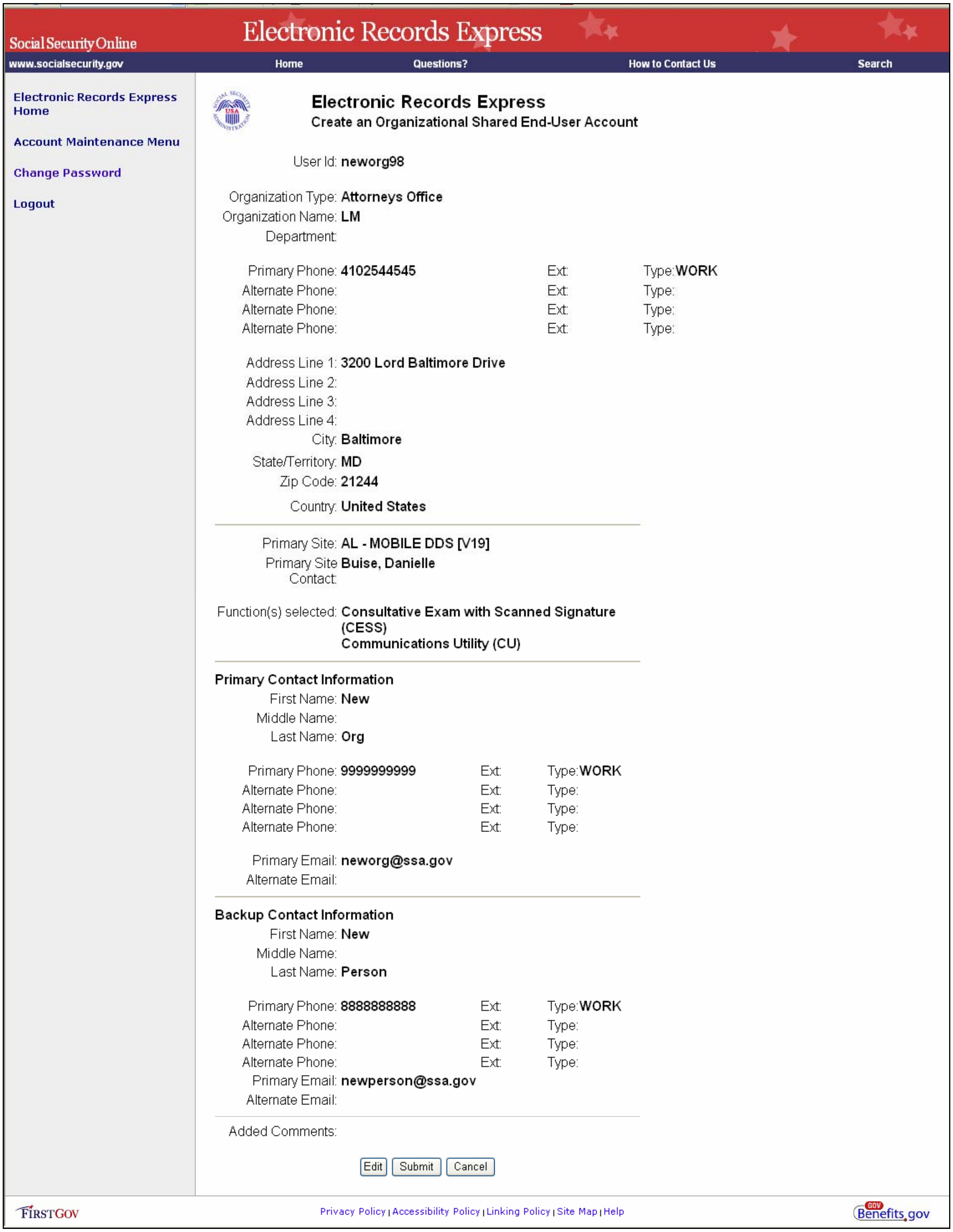


Figure 18: Create an Organizational Shared End-User – Account Summary Page

Step 11: From the **Account Summary** page, click the **Edit** button to return to the prior screen to change any information you have entered ***OR*** click the **Cancel** button to cancel the account setup ***OR*** click the **Submit** button to create the account.

Step 12: Clicking **Submit** will activate the new account. You will receive a **Confirmation** screen that provides the **Temporary Password** for the new account (See Figure 19).

Figure 19: Create an Organizational Shared End-User – Confirmation Screen

Step 13: The following **emails** are sent to provide notification of the new account (See Sample Email Notifications in the Appendix):

a. A confirmation email that includes the temporary password and identifying information for the new user will be sent to the creator of the account.

b. The Sponsor (Primary Site Contact) will receive a copy of the confirmation email that includes the temporary password and identifying information for the new user. The sponsor is advised in this email to contact the new user to provide the account password.

c. An email is sent to the Primary Contact of the new account to provide the User ID, instructions and Sponsor (Primary Site Contact) information.

Step 14: The **Sponsor** (Primary Site Contact) must contact the new user to provide the password. The temporary password which was automatically generated by the website is valid for one time use only. The first time the new user logs into the website, he/she must change the password.

Return to Table of Contents

Create a Sponsor Account

A Sponsor is someone designated to create and maintain End-User accounts. Sponsor accounts are always demo accounts. Documents submitted via demo accounts are not received by DMA and are not routed to the electronic folder. Therefore, a sponsor cannot send or receive files unless the account has access to the Secure Messaging function. See the following steps for the creation of a Sponsor account.

Step 1: Select the **Create a Sponsor Account** hyperlink from the Account Maintenance Menu.

**Note that mandatory fields on this webpage are marked with a red asterisk (*).

**The "Demo Account" checkbox at the top of the page is checked by default. This checkbox can not be changed.

Step 2: Enter the desired **User ID** in the text box. SSA Policy requires that all User IDs be exactly **8** characters in length and they must contain at least 1 numeric and 1 alphabetic character. Special characters (e.g., &, %, #, @, etc.) are not permitted (See Figure 20).

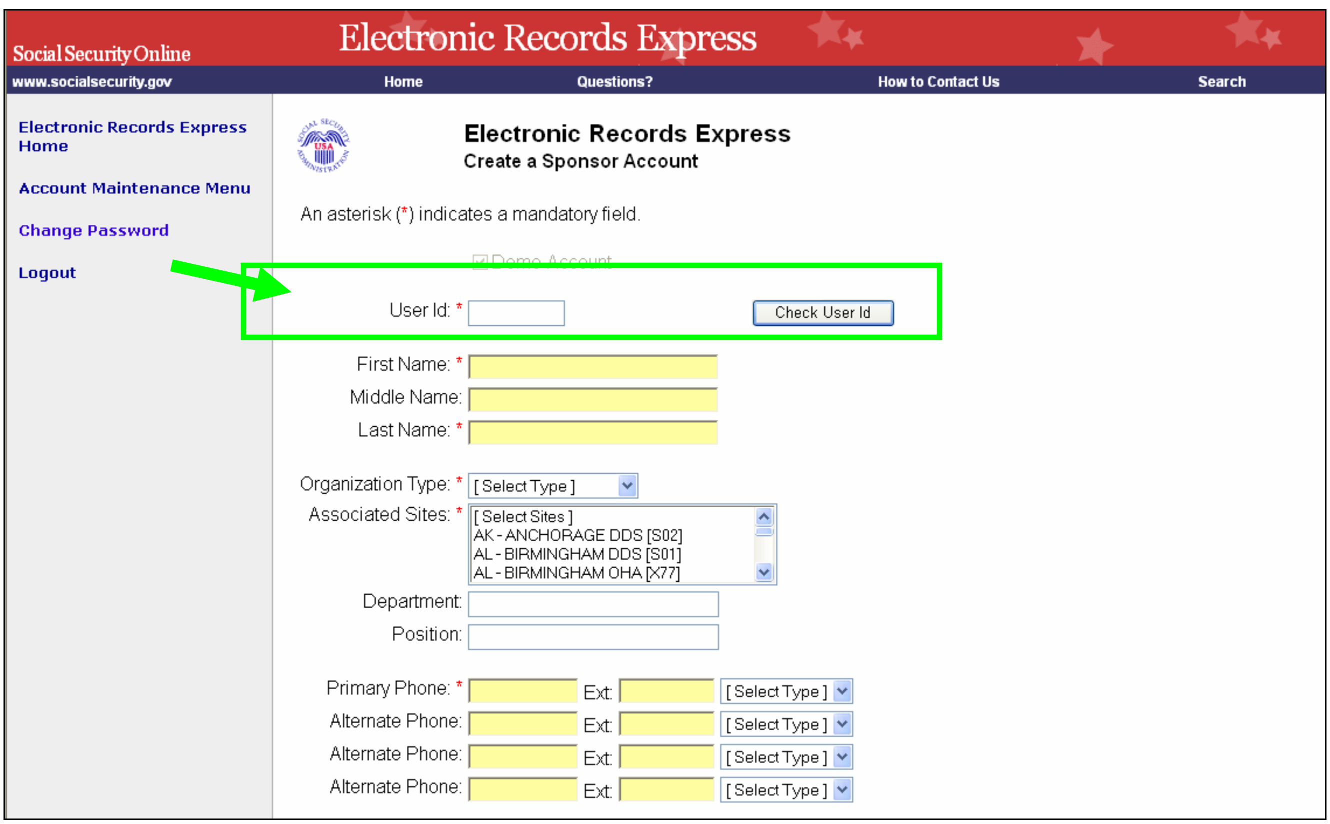


Figure 20: Create a Sponsor – User ID

Step 3: Click the **Check User ID** button to verify if the User ID entered is unique.

Figure 21 below shows that the User ID entered does not exist. This User ID may be used for account setup. Continue to the next field.

If an alert is received stating that the User ID you entered is already in use, verify if the existing account is for the same user and whether the role is Sponsor. You may need to update the existing account instead of creating a new account. If the existing account does not belong to the same user with a Sponsor account or if a new account is required for the same user, you must assign a different User ID to create the new account.

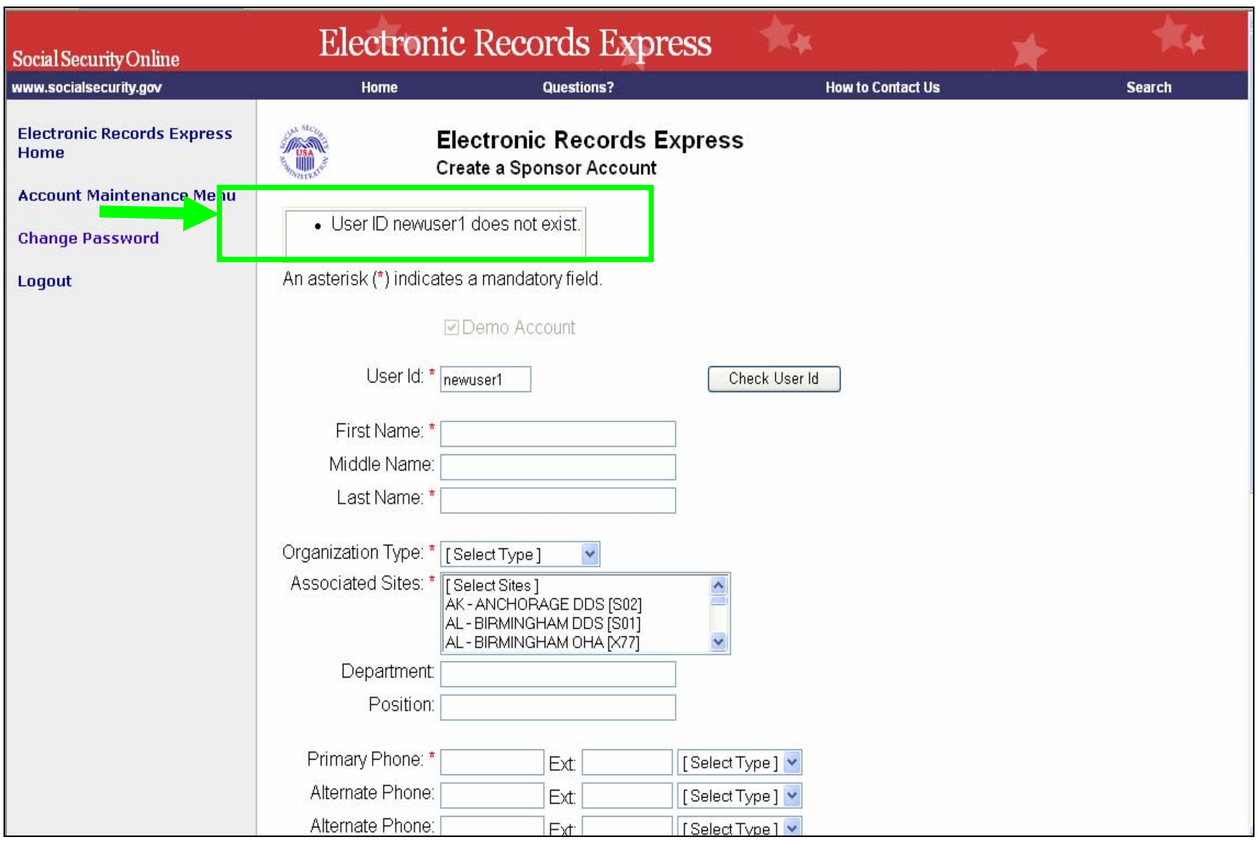


Figure 21: Create a Sponsor – Check User ID Alert

Step 4: Enter the requested **User** information:

- **First Name**
- **Middle Name**
- **Last Name**

Step 5: Enter the requested **Office** information:

- **Organization Type –** Select either SSA State DDS Site or SSA State OHA Site from the dropdown menu

- **Associated Sites –** Select the site(s) that the Sponsor represents. Multiple sites can be selected by holding the CTRL key and clicking the desired sites.
- **Department**
- **Position**
- **Telephone Number(s)**
- **Phone Type(s) –** Select the type from the dropdown menu for each phone number entered
- **Email Address(es)**

Step 6: Select the **Functions** (website utilities) to which the Sponsor will have access. Select all utilities the Sponsor needs. By default, the Sponsor will be assigned all of the utilities except Secure Messaging (SM). (See Figure 22)

****Note**: The secure messaging option needs prior approval from the Electronic Records Express Project Manager.

****Note**: Sponsors cannot provide access to or modify access to functions (website utilities) that are not assigned to their accounts.

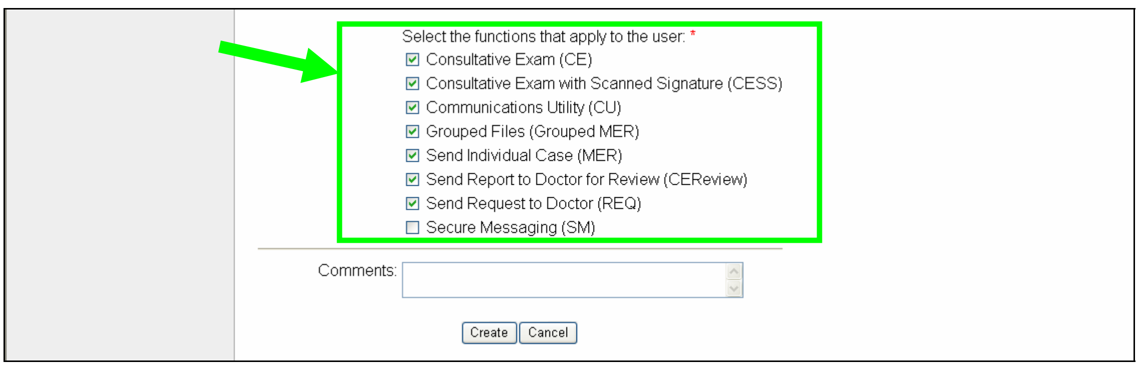


Figure 22: Create a Sponsor – Functions

Step 7: Enter any **Comments** in the text box.

Step 8: Click the **Create** button to create the account ***OR*** click the **Cancel** button to cancel the account setup and return to the Account Maintenance Menu. The **Account Summary** page is generated when the **Create** button is selected. (See Figure 23)

Figure 23: Create a Sponsor – Account Summary

Step 9: From the **Account Summary** page, click the **Edit** button to return to the prior screen to change any information you have entered ***OR*** click the **Cancel** button to cancel the account setup ***OR*** click the **Submit** button to create the account.

Step 10: Clicking **Submit** will activate the new account. You will receive a **Confirmation** screen that provides the Temporary Password for the new account (See Figure 24).

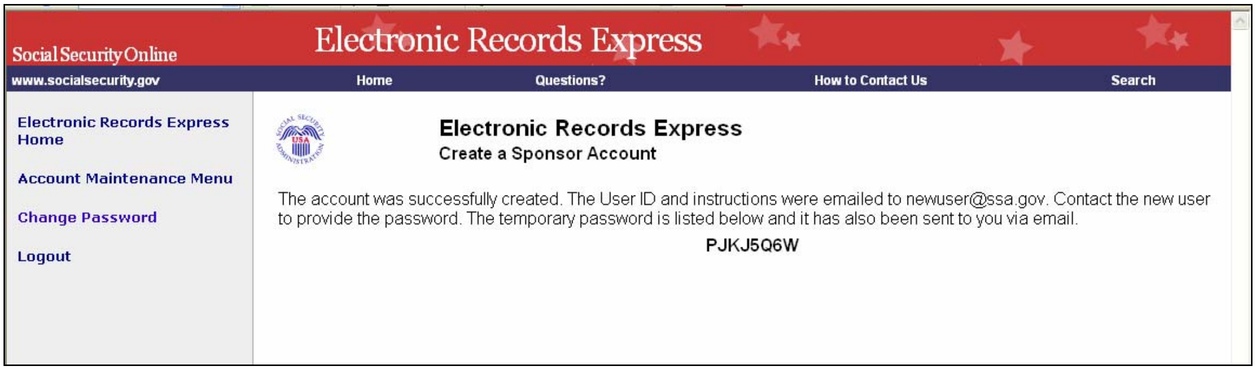


Figure 24: Create a Sponsor – Confirmation Screen

Step 11: The following **emails** are sent to provide notification of the new Sponsor account (See Sample Email Notifications in the Appendix):

a. A confirmation email that includes the temporary password and identifying information for the new Sponsor will be sent to the creator of the account.

b. An email is sent to the new Sponsor to provide the User ID and instructions.

Step 15: The **Account Creator** must contact the new Sponsor to provide the password. The temporary password which was automatically generated by the website is valid for one time use only. The first time the new Sponsor logs into the website, he/she must change the password.

Return to Table of Contents

Search Accounts

There are two methods of searching for existing Electronic Records Express accounts: Search on Specified Criteria or List All Accounts Alphabetically by User ID. Use either method to locate accounts to display, print or update.

Search on Specified Criteria

This search method allows the user to input criteria for filtering of the accounts to display. See the following steps to request an account Search on Specified Criteria (See Figure 34):

Step 1: Select the **Search on Specified Criteria** hyperlink from the Account Maintenance Menu.

Step 2: Enter the information that you would like to use to filter the account(s) you wish to search. **Search criteria** includes:

- User ID
- First name
- Last name
- Phone number
- Email address
- Primary DDS Site

Step 3: Select one of the following to determine what accounts should display:

- Match **all** information entered
- Match **any** information entered
- Match information **exactly**

Step 4: Select the **function(s)** to be included in the search.

Step 5: Select one of the following to determine what accounts should display:

- Match **all** selected functions
- Match **any** selected functions

Step 6: Indicate whether to include **Demo Accounts** or **Exclude Deleted Accounts** by selecting the appropriate checkbox on the bottom of the page.

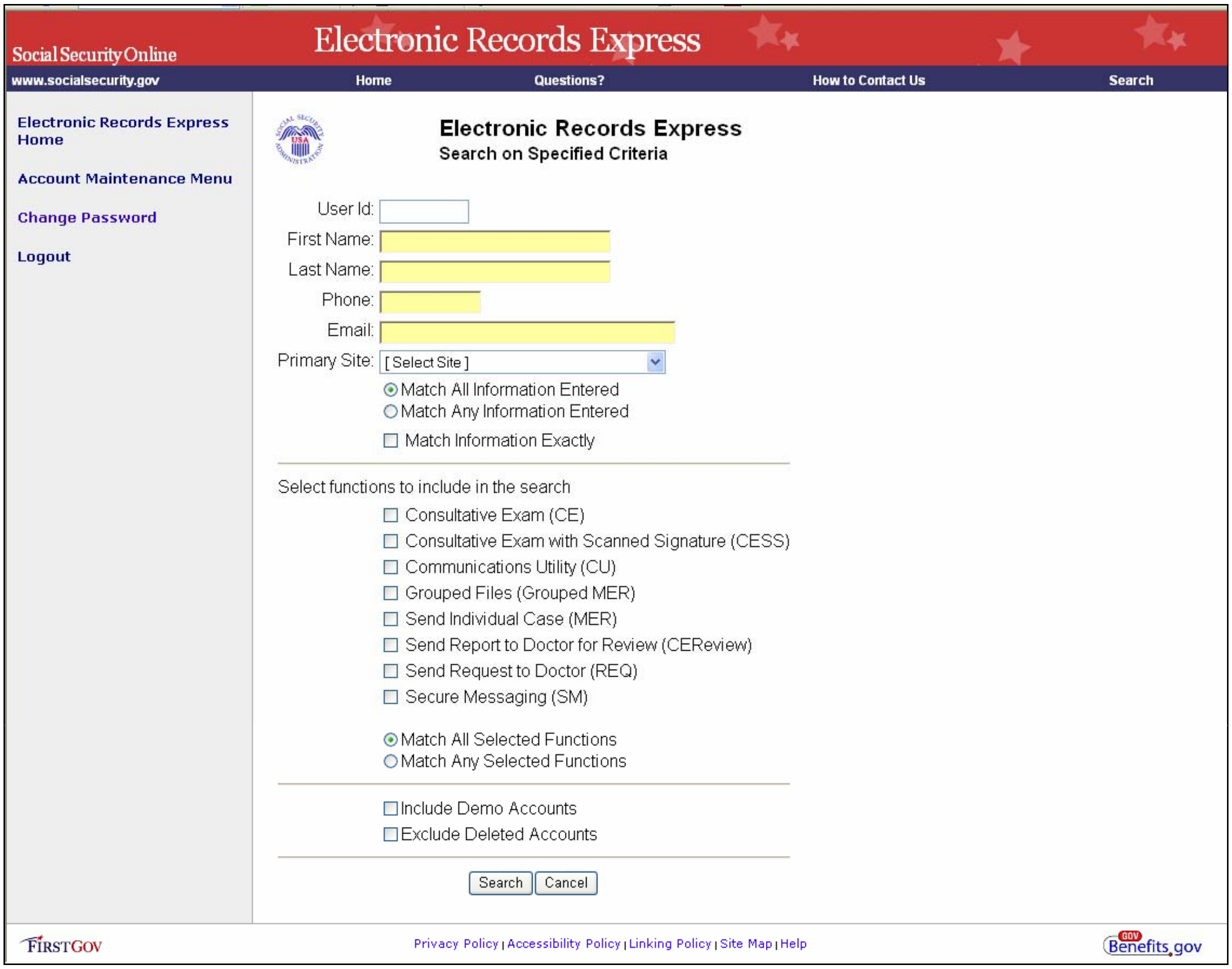


Figure 25: Search on Specified Criteria

Step 7: Click the **Search** button to display the accounts meeting your criteria ***OR*** click the **Cancel** button to cancel the request and return to the Account Maintenance Menu. The **Search Results** screen is generated when the **Search** button is selected.

A search for users with assigned Primary Site of S02 yielded the results shown below. You may have to use the scroll bar to view the complete list. (See Figure 35)


Social Security Online

www.socialsecurity.gov

Electronic Records Express

Home Questions? How to Contact Us Search

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout

Electronic Records Express
Search Results

Use the browser's Find feature (Ctrl+F on many browsers) to find specific text on this page.

User Id	Account Type	First Name	Last Name	Organization	Phone	Email	Site
111111ii	EndUser	sfd	ssf		1	qinghua.liu@ssa.gov	S02
111emily	EndUser	emily	hunter	ssa	410	qinghua.liu@ssa.gov	S02
1brami23	EndUser	William	Campbell		907-276-7374	wildbillcampbell@hotmail.com	S02
2345org2	EndUser	p	chandr		123	pradeep.chandrashekhar@ssa.gov	S02
akjames1	EndUser	David	James	VA	907-257-4735	David.James@med.va.gov	S02
asdf3333	EndUser	asdf	sadf		234234	david.hsieh@ssa.gov	S02
dbuise00	EndUser	Danielle	Buise		9999999999	danielle.c.buise@ssa.gov	S02
dbuise02	Organization	Danielle	Buise	LM	4541212222	danielle.c.buise@ssa.gov	S02
dbuise04	Organization	Danielle	Buise	LM	4102523233	danielle.c.buise@ssa.gov	S02
dbuise05	EndUser	Danielle	Buise	DLS	4102526565	danielle.c.buise@ssa.gov	S02
dbuise06	Organization	Danielle	Buise	LM	4105940224	danielle.c.buise@ssa.gov	S02
dbuise11	EndUser	Danielle	Buise		4105970224	danielle.c.buise@ssa.gov	S02
dbuise20	EndUser	Danielle	Buise		4105970224	danielle.c.buise@ssa.gov	S02
df343445	EndUser	asdfasdf	ffadfaf		345345	david.hsieh@ssa.gov	S02
dhe12111	Organization	test	test	one'two'three'four'five'six'seven'eight	11111	david.hsieh@ssa.gov	S02
dhe33333	EndUser	sadf	adsf		234234	david.hsieh@ssa.gov	S02
dhe55555	EndUser	adf	asdf		324234	david.hsieh@ssa.gov	S02

Figure 26: Search Results Screen

Step 8: **Sort** the displayed accounts by any of the column headers on the Search Results screen. Click the blue **column header** to sort the listing by that field. By default, the search results will be sorted by **User ID**.

Step 9: **View** any account on the Search Results screen by clicking on the User ID, First Name, or Last Name of the desired account. The **Account Summary** screen will display for the selected account. (See the **[Account Summary](#)** screen in the Appendix)

Step 10: Select the **View Log History** hyperlink from the **Account Summary** screen to view the last 10 transactions on the selected account.

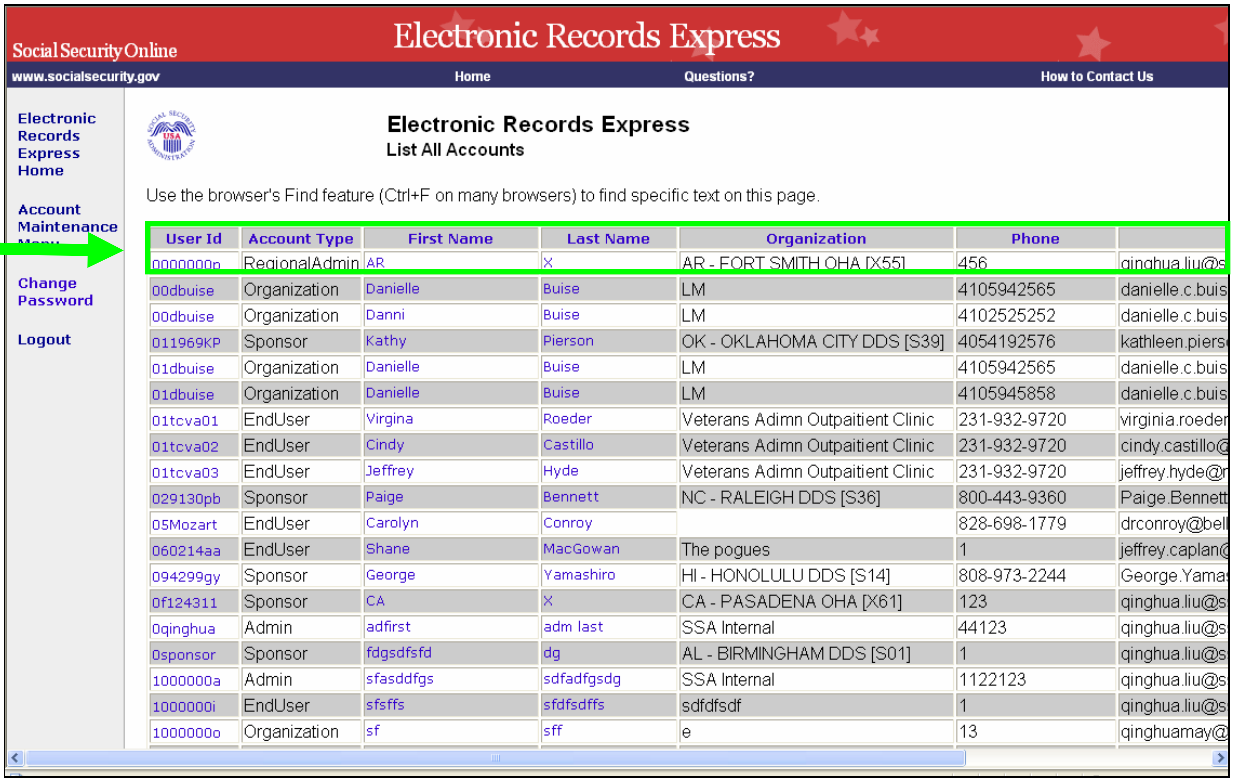
[Return to Table of Contents](#)

List All Accounts Alphabetically by User ID

This search method displays all existing accounts sorted by User ID. See the following steps to request a list of all accounts sorted alphabetically by User ID.

Step 1: Select the **List All Accounts Alphabetically by User ID** hyperlink from the Account Maintenance Menu.

Step 2: The **List All Accounts** screen will be displayed listing all registered accounts. This list will be sorted in alphabetical order by User ID. Use the scroll bars to see the entire list. (See Figure 36)



User Id	Account Type	First Name	Last Name	Organization	Phone	
0000000p	RegionalAdmin	AR	X	AR - FORT SMITH OHA [X55]	456	qinghua.liu@s
00dbuise	Organization	Danielle	Buise	LM	4105942565	danielle.c.buis
00dbuise	Organization	Danni	Buise	LM	4102525252	danielle.c.buis
011969KP	Sponsor	Kathy	Pierson	OK - OKLAHOMA CITY DDS [S39]	4054192576	kathleen.piers
01dbuise	Organization	Danielle	Buise	LM	4105942565	danielle.c.buis
01dbuise	Organization	Danielle	Buise	LM	4105945858	danielle.c.buis
01tcva01	EndUser	Virgina	Roeder	Veterans Adimn Outpaitient Clinic	231-932-9720	virginia.roeder
01tcva02	EndUser	Cindy	Castillo	Veterans Adimn Outpaitient Clinic	231-932-9720	cindy.castillo@
01tcva03	EndUser	Jeffrey	Hyde	Veterans Adimn Outpaitient Clinic	231-932-9720	jeffrey.hyde@r
029130pb	Sponsor	Paige	Bennett	NC - RALEIGH DDS [S36]	800-443-9360	Paige.Bennett
05Mozart	EndUser	Carolyn	Conroy		828-698-1779	drconroy@bell
060214aa	EndUser	Shane	MacGowan	The pogues	1	jeffrey.caplan@
094299gy	Sponsor	George	Yamashiro	HI - HONOLULU DDS [S14]	808-973-2244	George.Yamas
0f124311	Sponsor	CA	X	CA - PASADENA OHA [X61]	123	qinghua.liu@s
0qinghua	Admin	adfirst	adm last	SSA Internal	44123	qinghua.liu@s
0sponsor	Sponsor	fdgsdfsfd	dg	AL - BIRMINGHAM DDS [S01]	1	qinghua.liu@s
1000000a	Admin	sfasddfgs	sdfadfgsdg	SSA Internal	1122123	qinghua.liu@s
1000000i	EndUser	sfsffs	sfdfsdffs	sdfdfsdf	1	qinghua.liu@s
1000000o	Organization	sf	sff	e	13	qinghuamay@

Figure 27: List All Accounts Screen

Step 11: Sort the displayed accounts by any of the column headers on the List All Accounts screen. Click the blue **column header** to sort the listing by that field. By default, the search results will be sorted by **User ID**.

Step 12: View any account on the List All Accounts screen by clicking on the User ID, First Name, or Last Name of the desired account. The **Account Summary** screen will display for the selected account. (See the [Account Summary](#) screen in the Appendix)

Step 13: Select the **View Log History** hyperlink from the **Account Summary** screen to view the last 10 transactions on the selected account.

Return to Table of Contents

Update an Existing Account

Existing Accounts can be updated by performing the following tasks: Modify Account Information, Suspend an Account, Reactivate a Suspended Account, Reset a Password, and Delete an Account.

If you wish to update your own account select one of the following tasks: Modify My Account Information or Change My Password.

Modify Account Information

Administrators can modify all types of accounts. All data stored within the account can be modified except the **User ID**, **Role**, and **Status**. Additionally, the **Demo Indicator** cannot be removed from Regional Administrator and Sponsor accounts. See the following steps to Modify Account Information.

Step 1: Select the desired account to modify via the **Search on Specified Criteria** or **List All Accounts Alphabetically by User ID** feature.

Step 2: Click the **Modify** button from the bottom of the Account Summary page. (See the **Account Summary** screen in the Appendix)

Step 3: The **Modify Account** page is displayed. Make any necessary modifications. Use the scroll bar to view additional fields for modification. (See Figure 37)

Step 4: Click the **Modify** button on the bottom of the Modify Account page.

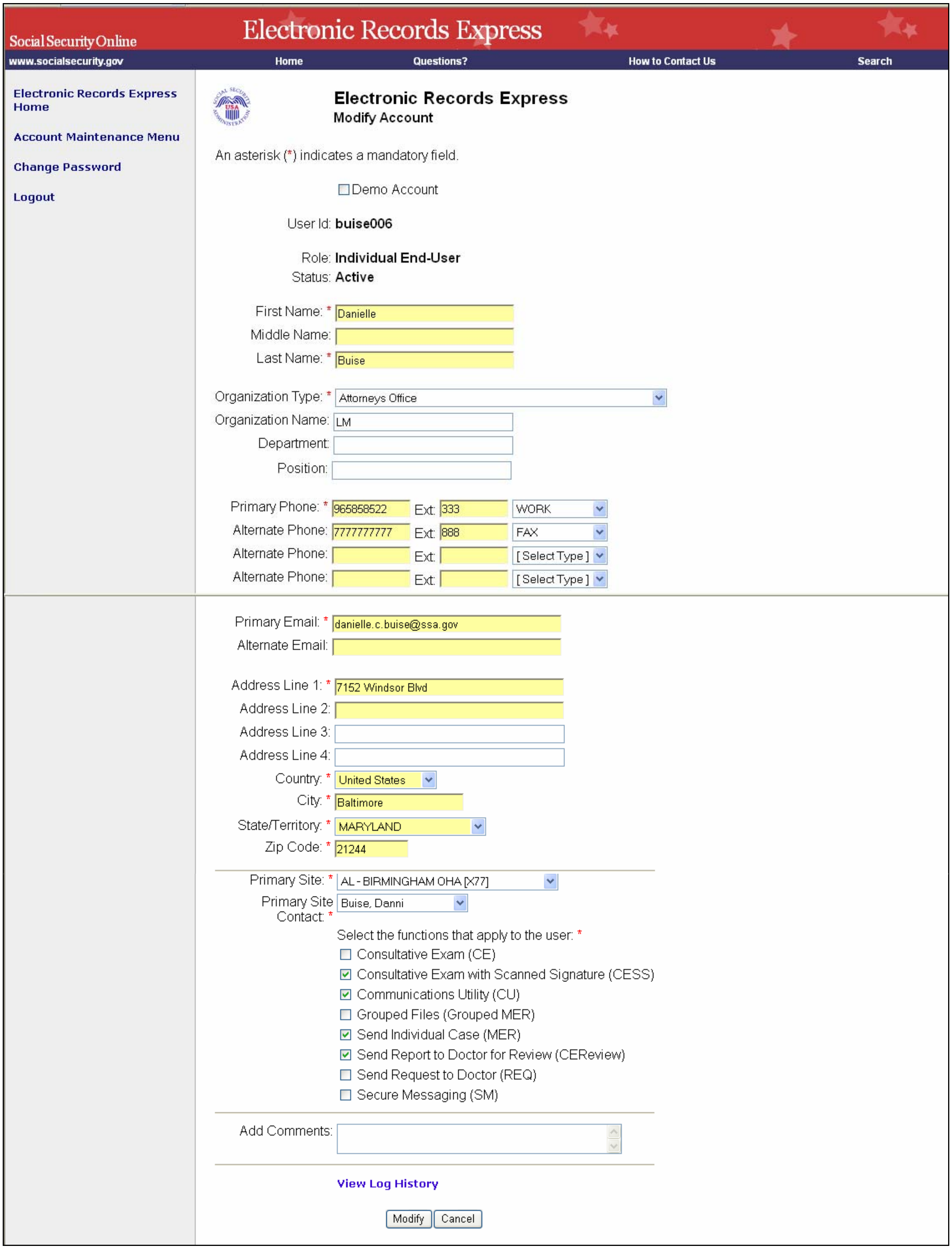


Figure 28: Modify Account Screen

Step 5: An **Account Summary** page will be displayed for the account. Verify that the information on the Account Summary page is accurate.

Step 6: From the Account Summary page, click the **Edit** button to return to the prior screen to change any information you have entered ***OR*** click the **Cancel** button to cancel the account modification ***OR*** click the **Submit** button to modify the account.

Step 7: A **Confirmation Screen** will display after selecting the **Submit** button. (See Figure 38)

Figure 29: Modify Confirmation Screen

Return to Table of Contents

Suspend an Account

Accounts will be suspended when the rules or regulations governing Electronic Records Express Website accounts are violated. Someone allowing another person to use their Individual End-User account is an example of a violation that would warrant suspension of the account. See the following steps to suspend an account.

Step 1: Select the desired account to suspend via the **Search on Specified Criteria** or **List All Accounts Alphabetically by User ID** feature.

Step 2: Click the **Suspend** button from the bottom of the Account Summary page. (See the **Account Summary** screen in the Appendix)

Step 3: A **Confirmation Screen** will display after selecting the **Suspend** button. (See Figure 39)

Note: The account status will now be changed to **Suspended**.

Figure 30: Suspend Confirmation Screen

Return to Table of Contents

Reactivate a Suspended Account

Accounts that have been suspended because the rules or regulations governing Electronic Records Express Website accounts were violated will be reactivated once the Sponsor indicates that the user has been advised of the infraction. Someone allowing another person to use their Individual End-User account is an example of a violation that would warrant suspension of the account. See the following steps to reactivate a suspended account.

Step 1: Select the desired suspended account to reactivate via the **Search on Specified Criteria** or **List All Accounts Alphabetically by User ID** feature.

Step 2: Click the **Reactivate** button ***OR*** click the **Reset Password button** from the bottom of the Account Summary page. (See Figure 40)

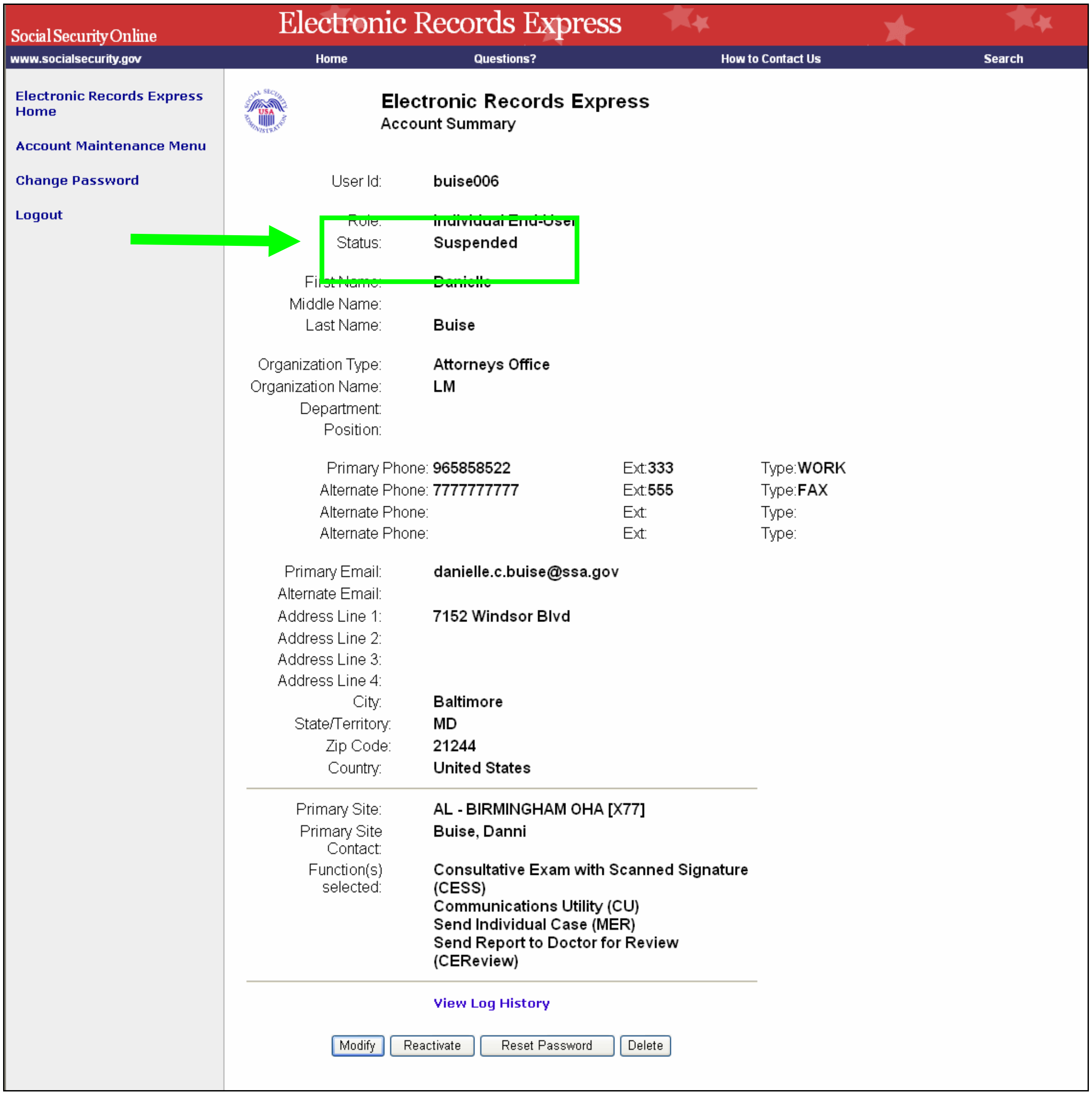


Figure 31: Account Summary Reactivate Screen

Step 3: A **Confirmation Screen** will display after selecting either the **Reactivate *or* Reset Password** button. (See Figure 41)

Note: The account status will now be changed to **Active**.

Figure 32: Reactivate Confirmation Screen

Return to Table of Contents

Reset a Password

Reset the account password when users forget their passwords. Additionally, the system will lock an account if the wrong password is entered three times during login. In the latter situation the status for the account will be changed to **Locked**. You must reset the password to unlock a locked account. See the following steps to reset a password.

Step 1: Select the desired account to reset the password via the **Search on Specified Criteria** or **List All Accounts Alphabetically by User ID** feature.

Step 2: Click the **Reset Password button** from the bottom of the Account Summary page. (See Figure 42)

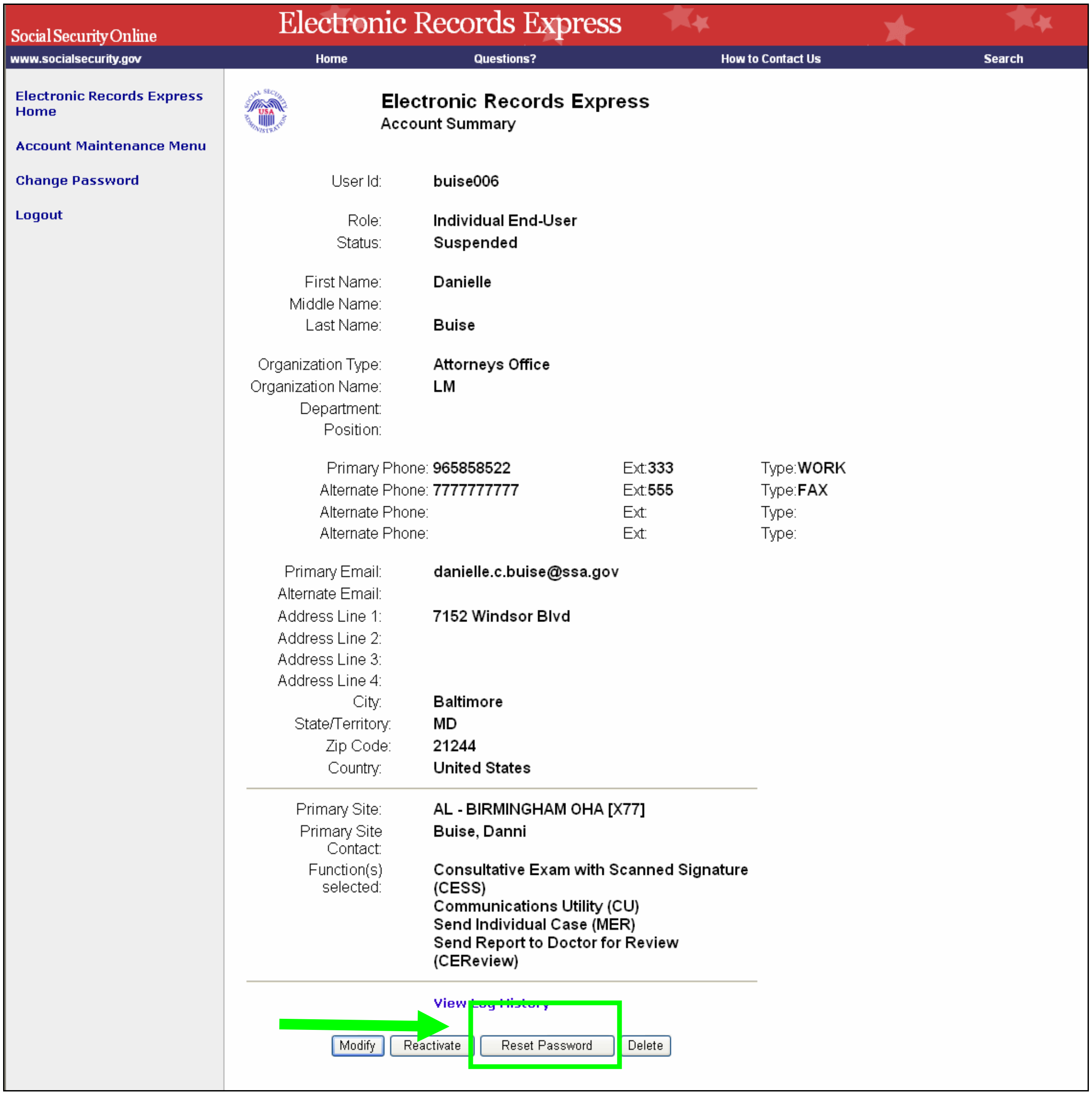


Figure 33: Account Summary Reset Password Screen

Step 3: A **Confirmation Screen** that provides a **Temporary Password** for the account will display after selecting the **Reset Password** button. (See Figure 43)

> **Note**: The account status will now be changed to **Active** if the status was **Locked** previously.

Figure 34: Reset Password Confirmation Screen

Step 4: The following **emails** are sent to provide notification of the reset password (See Reset Password Email Notifications in the Appendix):

a. The Sponsor (Primary Site Contact) will receive an email that includes the reset temporary password and identifying information for the account. The sponsor is advised in this email to contact the user to provide the reset password.

b. An email is sent to the user to advise that the password was reset.

Step 5: The **Sponsor** (Primary Site Contact) must contact the user to provide the password. The temporary password which was automatically generated by the website is valid for one time use only. The user is forced to change the password during the first login to the website after the password is reset.

Return to Table of Contents

Delete an Account

Accounts are deleted only if the account was erroneously established or the user will never use this account in the future. **A deleted account can never be reactivated, and the User ID cannot be used again in the future.** Therefore, use caution when deleting an account. See the following steps to delete an account.

Step 1: Select the desired account for deletion via the **Search on Specified Criteria** or **List All Accounts Alphabetically by User ID** feature.

Step 2: Click the **Delete button** from the bottom of the Account Summary page. (See Figure 44)

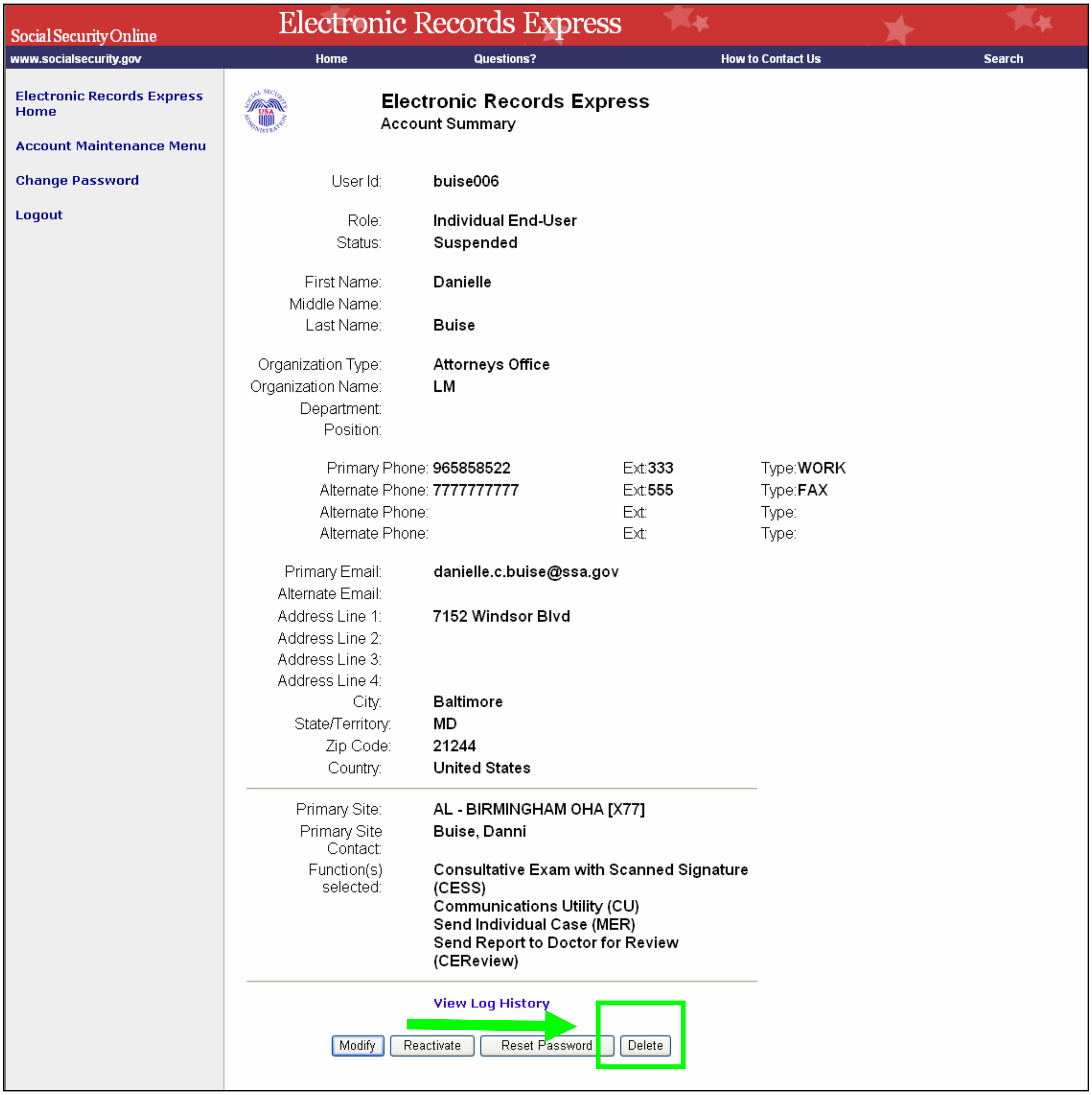


Figure 35: Account Summary Delete Screen

Step 3: A **Confirmation Request Screen** will display asking you to confirm your request to delete the specified account. Click the **Cancel** button to cancel the account deletion and return to the Account Maintenance Menu ***OR*** click the **Continue** button to delete the account. (See Figure 45)

Figure 36: Deletion Confirmation Request Screen

Step 4: Clicking **Continue** will delete the account. A **Confirmation Screen** will display after selecting the **Continue** button. (See Figure 46)

Note: The account status will now be changed to **Deleted.**

Figure 37: Deletion Confirmation Screen

Return to Table of Contents

Modify My Account Information

All data stored within your personal account can be modified except the **User ID**, **Role**, and **Status**. See the following steps to modify your personal account information.

Step 1: Select the **Modify My Account Information** hyperlink from the Account Maintenance Menu. (See Figure 47)

Figure 38: Modify My Account Information Selection

OR

Select the **Change** hyperlink from the **User Information** box on the Electronic Records Express Homepage. (See Figure 48)

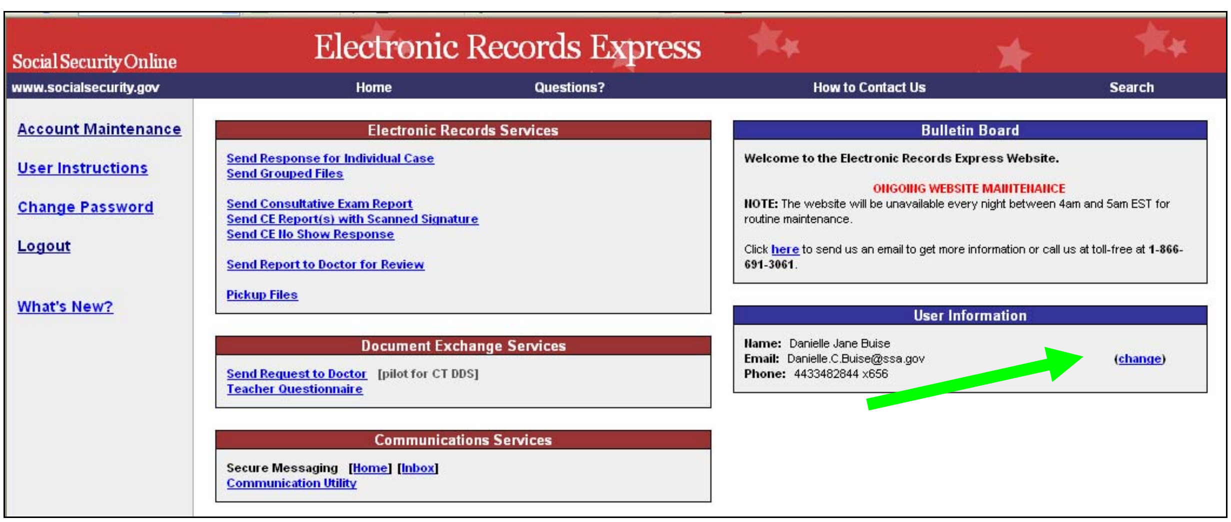


Figure 39: Modify My Account – Change Hyperlink

Step 2: The **Modify My Account** page is displayed. Make any necessary modifications. Use the scroll bar to view additional fields for modification. (See Figure 49)

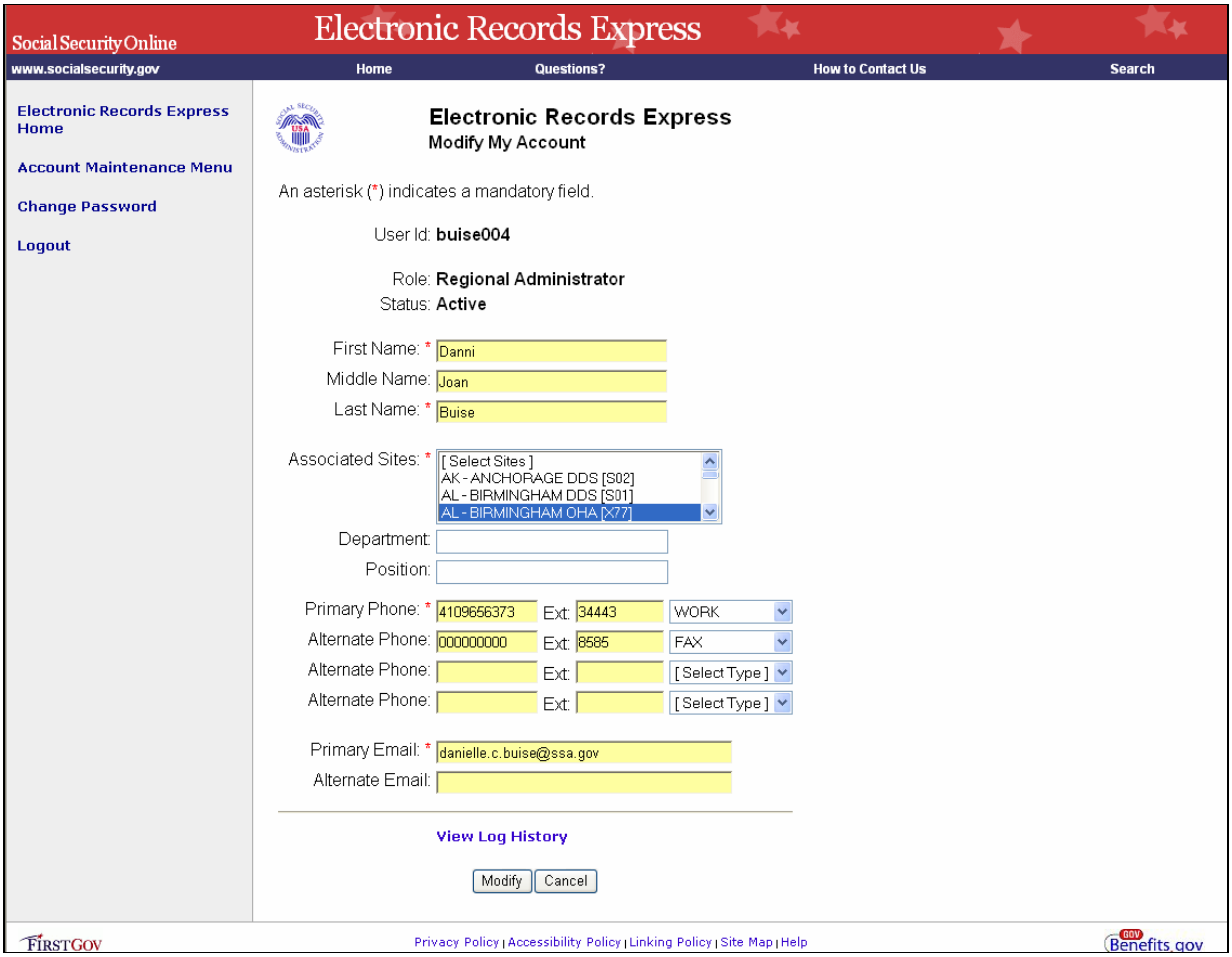


Figure 40: Modify My Account Screen

Step 3: Click the **Modify** button on the bottom of the Modify Account page.

Step 4: An **Account Summary** page will be displayed for the account. Verify that the information on the Account Summary page is accurate.

Step 5: From the Account Summary page, click the **Edit** button to return to the prior screen to change any information you have entered ***OR*** click the **Cancel** button to cancel the account modification ***OR*** click the **Submit** button to modify your account.

Step 6: A **Confirmation Screen** will display after selecting the **Submit** button. (See Figure 50)

Figure 41: Modify My Account Confirmation Screen

Return to Table of Contents

Change My Password

You should change your password periodically to assure security of your account. See the following steps to change the password on your personal account.

Step 1: Select the **Change My Password** hyperlink from the Account Maintenance Menu. (See Figure 51)

Figure 42: Change My Password Selection

OR

Select the **Change Password** hyperlink from the sidebar selections on the Electronic Records Express Homepage. (See Figure 52)

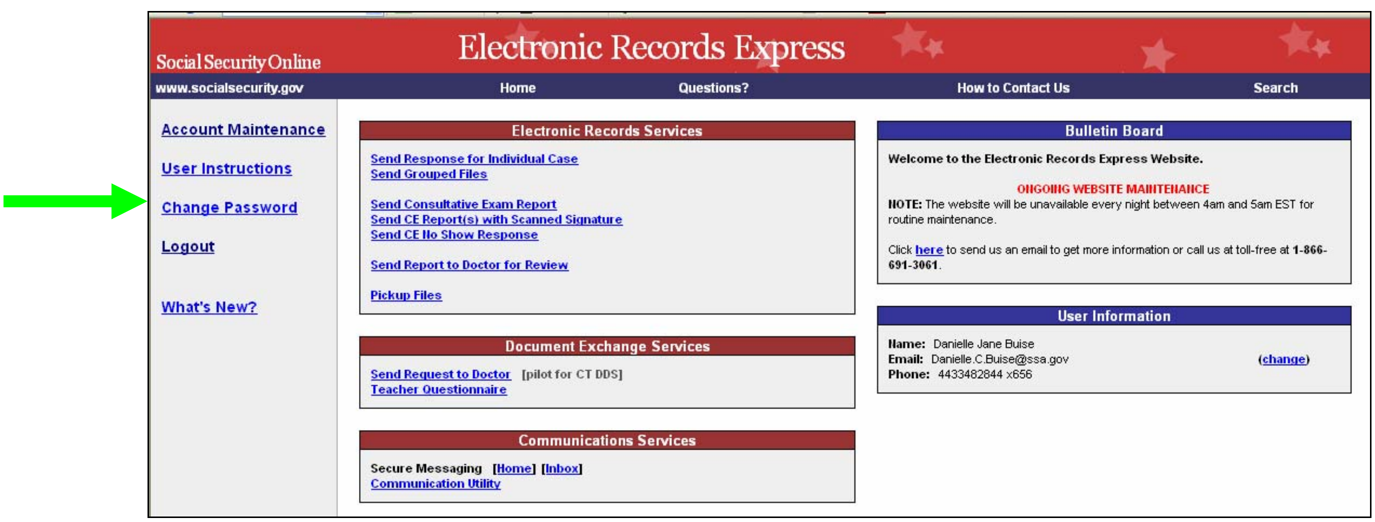


Figure 43: Change Password – Sidebar selection

Step 2: The **Change Password** page is displayed. (See Figure 53)

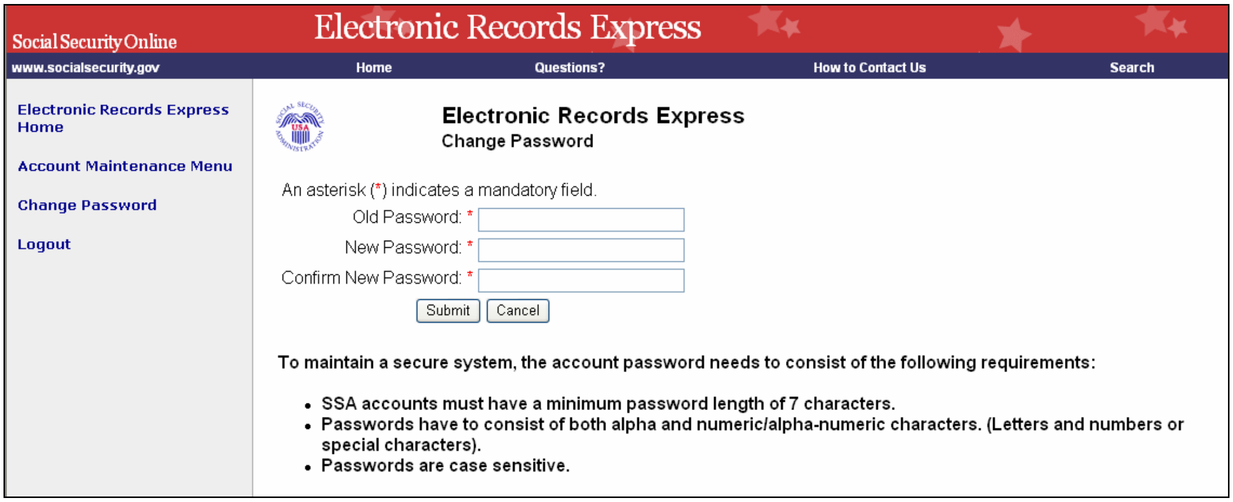


Figure 44: Change Password Screen

Step 3: Enter the **Old Password** (current password).

Step 4: Enter the **New Password** using the password requirements listed on the screen.

Step 5: Enter the new password again in the **Confirm New Password** field to verify it was entered correctly.

Step 6: Click the **Submit** button to submit your password change ***OR*** click the **Cancel** button to cancel the password change.

Return to Table of Contents